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POSITION MANAGEMENT AND COMPENSATION DIVISION

OFFICE OF PERSONNEL

The attached guidance material is intended to assist you as a manager or staff officer in the review of your organizational and position structure and in the preparation of meaningful position descriptions.

Included in the Package:

I. DEFINITIONS

II. POSITION MANAGEMENT

- a. List of common organizational problems
- b. Position Management Standards
- c. Secretaries and Position Management practices

III. POSITION CLASSIFICATION

- a. Outline of the Factor Evaluation System
- b. Guide for writing position descriptions under FES
- c. Sample position descriptions
- d. Guide for writing Supergrade position descriptions under FES
- e. Sample Supergrade position description
- f. Things that don't count in classifying your position

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I. DEFINITIONS

a. Position Management

Position Management is primarily the "line manager's" responsibility in conjunction with the appropriate staff specialist. Position Management is the conscious regular examination of the following areas of interest: (1) job need, (2) organizational structure, (3) the work process, and (4) the design of jobs. Position Management is concerned with the MANAGEMENT DECISIONS which must be made as to the basic foundation and structure of organizations. These are decisions involved in the "areas of interest" listed above. Position Management is the basic framework of the personnel management system.

b. Position Classification

Position classification is an integral part of the position management process. Specifically it involves the analysis and evaluation of individual positions, inter-relationships with other positions and the assignment of pay schedule, occupational series, title and pay level.

Position classification, through the fact-finding and evaluation process, provides the basis for position management recommendations to management that can contribute to the decision making process.

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POSITION MANAGEMENT

Common Organizational Problems

1. Fragmentation - organization is unnecessarily split into many small segments.

- PROBLEMS:
1. Small units may become so specialized that they restrict the employee's potential contribution.
 2. Communication between units is restricted and action shows down.
 3. Fluctuations of workload become hard to handle.

2. Excessive Layering - too many levels in the chain of command.

- PROBLEMS:
1. Movement of ideas is restricted since they must be evaluated and restated by each supervisor.
 2. Top management often is unaware of how decisions have been made at lower levels.
 3. Lower level supervisors and employees are too restricted in what they can do and become frustrated.

3. Unnecessary Positions - "assistant chief" jobs that are not really needed.

- PROBLEMS:
1. Full assistants, or deputies, add another level to the chain of command.
 2. This creates delays in decision-making and increases the likelihood of duplication of effort.
 3. Unnecessary staff assistant positions tend to cause staff-line conflicts.

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POSITION MANAGEMENT STANDARDS

PURPOSE

These standards are for the use of line managers and staff specialists in determining the soundness of positions and groups of positions (organization structures) from a position management viewpoint.

PART I provides criteria to consider when setting up new positions, changing the work of existing positions, reestablishing inactive positions, or taking other actions involving one or a few of the positions in an organization segment.

PART II provides criteria to consider when conducting cyclic surveys or reviews, reorganizing, or making special studies which involve groups of positions - for example, all the positions in an organization segment or all the positions in an activity as a whole. This part addresses many of the same questions as Part I but explores the interrelationships involved more intensively. Part I has been purposefully designed to avoid the type of searching inquiry expected in applying Part II.

PART I. CRITERIA TO CONSIDER WHEN SETTING UP A NEW POSITION

Note: These criteria also apply when changing the work of a position, reestablishing a position, or taking any other action involving one or a few positions in an organization segment.

1. The position is needed.
 - a. It helps accomplish current activity objectives.
 - b. The current and projected workload clearly support setting it up or continuing it.
 - c. It represents the best use of available ceiling or is important enough to support a request for additional ceiling.
2. The position is sound from the standpoint of economy and effectiveness.
 - a. It fits satisfactorily into the present or anticipated workflow.

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- b. The work cannot be absorbed by other positions without serious damage to essential functions, nor can it be performed more economically or effectively by introducing a labor-saving device. Suitable arrangements cannot be made to shift any sporadic or seasonal work to other positions.
 - c. If it is supervisory, the segment supervised cannot be merged with another without seriously interfering with mission accomplishment.
 - d. If it is supervisory it reflects a reasonably broad span of control. At least three substantive personnel (performing the "line" work of the segment) are supervised at the first level, and many more when subordinates require little attention, policies and procedures are well established, and the workload is stable. At higher levels a minimum of three segments are supervised.
 - e. It is is a deputy (full-time line assistant), it is not being established primarily for continuity. The supervisory workload is too much for one person or the superior is frequently away for extended periods and the deputy must make major decisions in his absence. Such responsibility cannot be assigned on a part-time or rotating basis to other personnel.
 - f. If it is a support or service position it does not unduly increase the ratio of such positions to "producer" positions.
 - g. If it is concerned with high-level work, it does not remove some of this work from other positions without good reason. (Furnishing backup to a higher-level employee in his absence is not normally such a reason.)
3. The position is sound from a motivational viewpoint.
- a. It is not unduly narrow. It provides reasonable opportunity for job satisfaction in terms of achievement and responsible performance.
 - b. If it is an entry or low-level position it is not "dead-end" - it provides reasonable opportunity to progress to higher-level work.
 - c. If it is supervisory it is more that of a true manager (goal-setter, planner, developer of people, etc.) than a "pusher" or "superchecker."

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PART II. CRITERIA TO CONSIDER WHEN STUDYING AN ENTIRE
ORGANIZATIONAL SEGMENT

For use when conducting cyclic surveys or reviews, reorganizing, or making special studies which involve groups of positions - for example, all the positions in an organization segment or all the positions in an activity as a whole.

1. All the work performed is essential.
 - a. Each major item of work helps accomplish current activity objectives.
 - b. Any duplication or overlap with other segments is deliberate because of operational needs.
2. The structure reflects a reasonable balance between economy and effectiveness.
 - a. Significant portions of the work cannot be absorbed elsewhere or done more economically without serious damage to essential functions.
 - b. Staffing reflects proper program emphasis. Where the segment has been cut back, its ability to perform its work has not been seriously impaired (through a top-heavy structure caused by the abolishment of lower-level positions or other imbalance).
 - c. Staffing is based on average rather than peak workload, using work measurement criteria and considering workload trends.
 - d. If the mission is expanding, staff (especially supervisory) is not being added too far in advance of the time when the workload becomes actual.
 - e. The average grade of the segment reflects the nature of the work done (e.g., the frequency with which senior skills are called for) or, if not, is the result of a purposeful response to operational needs.
 - f. There is no unnecessary fragmentation (the splitting of the organization into many small segments) - span of control is reasonably broad (there is no more supervision than is necessary). Supervisors are responsible for the work of at least three substantive personnel (performing the "line" work of the segment supervised) and many more when subordinates require little attention, policies and procedures are well established, and workload is stable. Supervisors above the first level manage at least three segments.

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- g. Deputy positions (full-time line assistants) do not exist primarily for continuity. In each case the supervisory workload is too much for one person, or the superior is frequently away for extended periods and the deputy must make major decisions in his absence. Such responsibility cannot be assigned on a part-time or rotating basis to other personnel.
 - h. Support service segments are not unduly large in relation to "producer" segments. The practicability of a centralized service arrangement or of common- or cross-service agreements with other activities has been considered.
 - i. There is good manpower utilization. To the extent feasible, work assignments fit the special skills, experience, and potential of present employees.
 3. The structure enhances communication, decision-making, and the speed/quality of organizational responsiveness.
 - a. It is reasonably simple, considering the operations involved. Closely related work is associated physically as well as organizationally so that it can be more easily coordinated.
 - b. It is technologically suitable (in relation to workflow, procedures, equipment, facilities, layout, etc.). It is flexible enough to accommodate to foreseeable workload fluctuations - it includes plans for shifting employees among jobs in peak or slack periods.
 - c. The division of work - by function, product, purpose, etc. - is the best for the work performed, considering the special advantages the various arrangements offer (for example, easier coordination and better executive development under a product arrangement; more economical use of equipment and greater consistency of technical decisions under a functional arrangement).
 - d. The organization is not unduly layered (too many levels in the chain of command) - it is "flat" rather than "tall". Review levels are kept to a minimum. Authority for operational decisions is suitably delegated - when, for example:
 - Speedy, on-the-spot decisions must be made.
 - There is little need for uniformity or for coordination among segments.
 - The types of decisions are less significant.
 - Decisions can be based on rules or policy.
 - The personnel involved can be expected to know the facts or can get them together readily, and are believed capable of making sound decisions.

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4. The structure is sound from a motivational viewpoint.
 - a. Positions have sufficient job interest - are not unduly narrow. They provide reasonable opportunity for job satisfaction in terms of achievement, growth, decision-making, responsibility, and other aspects of "job enrichment."
 - b. Attention is given to promotion potential in positions. Career ladders (not necessarily confined to the segment or even the activity itself) provide entry to key positions.
 - c. Pertinent behavioral research findings have been considered. For example:
 - The advantage of departing from traditional forms of organization in special situations (such as the project manager concept in research and development).
 - The importance from an organizational "climate" point of view of supervisory positions being more managerial (goal-setting, planning, developing subordinates, etc.) than "pusher" or "superchecker" positions.
 - d. Unusual turnover, sick leave, or absenteeism are not primarily due (as determined from general observation or from attitude surveys) to the organization structure or the makeup of individual positions.

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Secretaries and Position Management Practices

The Federal service employs approximately 60,000 secretaries, an investment large enough to warrant care in management and job design. Today, over 95 percent of these positions are filled by women—interesting, since when the typewriter was invented in the 18th Century, it was considered so complicated that only men could operate it.

The Civil Service Commission is currently studying the occupation of secretary as part of its effort to develop new position classification and qualification standards. Although the study is not being conducted for position management purposes, its early findings show that management needs to improve the design and management of secretarial assignments. For example, interviews with secretaries and their supervisors show that:

□ Many people called secretaries aren't secretaries. They are given only typing, stenography, and very routine clerical work to perform. It's honest work, and sometimes hard work, and it's a big help. But they aren't secretaries. Those who take such jobs expecting to be secretaries or to become secretaries are disappointed. Those who would have gladly taken the jobs as typists or clerks aren't considered.

□ Many, perhaps most, supervisors have very little idea of what their secretaries are doing, or should be doing.

□ Many secretaries have poorly defined assignments. Too many secretaries are unaware of what their assignments should or could include. Having little knowledge of what is expected, they wait to be asked before beginning a task.

□ In some offices, the secretarial assignments seem to be affected, consciously or not, by an overly protective attitude toward women. The secretaries (almost invariably women) are not expected to show initiative or to develop any serious understanding of the purpose and administrative needs of the organization. Clearly, it is hard for the secretary to develop such an understanding, and if it is developed it does little good, since there's no demand for it. Little is expected of the secretary, and given such a management attitude, the expectation is realistic.

□ Many secretary positions are graded on the basis of echelon alone, rather than on the duties,

responsibilities, and qualification requirements of the assignment.

These problems are widespread, and they needn't be. But these problems would be markedly reduced if managers would consider even the following brief checklist.

✓ Don't decide you want a secretary and then think up duties to occupy a secretary's time. Think first of the duties to be performed, then of the knowledge, skills, and abilities required. Only then should you consider the title, occupation, and grade of the position.

✓ Tailor the position description to the requirements of the individual—don't rely entirely on standard position descriptions. Use standard descriptions only when several positions are very similar.

✓ Prepare a detailed task list for the position, refining and adding to it. Write it down. If you haven't thought enough about it to write it down, you haven't thought enough about it to invest money in the position.

✓ Write down:

—How you intend to assign the work and establish priorities.

—What you will consider evidence of good secretarial performance.

—How you plan to review the work.

✓ Talk to your secretary. Explain what you expect, both in terms of what duties are to be performed and how independently they are to be performed.

✓ Grant the secretary some independence. Let the job expand to fill the competence of the employee, if possible. People can become more responsible and more creative with experience and practice. Let it be known that you rely on your secretary.

✓ Ask the secretary to suggest additions and changes, and then seriously consider them.

✓ Don't confuse abandoning the employee with granting independence of action. Stay aware of what work should be done by the secretary, and what is done.

—John S. Warman

Bureau of Policies and Standards
U.S. Civil Service Commission

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FACTOR EVALUATION SYSTEM

Historical Background

- o Hanley Subcommittee study, leading to P.L. 91-216 (1967-69)
- o Job Evaluation & Pay Review ("Oliver") Task Force study/recommendations (1970-72)
- o Test & Implementation Group development and nationwide field test (1972-74)
- o Extensive consultation with agencies, unions, and professional groups (1974-75)
- o Commission decision to implement FES (12-17-75)

Implementation Plans

- o Public announcement of decision to implement FES (12-75)
- o Distribution of initial eight draft FES standards to agency hq's (3-76)
- o Agency redistribution to field installation reviewers (4-76)
- o Phase I training - nonreimbursable
 - 24 courses in D.C. and field locations to train 700 agency personnel to review initial draft FES standards (4/5-76)
- o Agency review and comment on initial draft standards (by 7-19-76)
- o Phase II training - reimbursable
 - Analyze Phase I training critiques and revise training manual (7-76)
 - Offer Interagency FES courses and instructor's manual for agency use (Fall-76)
- o Review, analyze, act upon comments on draft standards (7/10-76)
- o Publish first final FES standards for mandatory use (12-76)
- o produce 250+ FES standards over five year period (through 1981/82)
- o Monitor FES for appropriateness, responsiveness, and utility (continuing)

OUTLINE OF FES TECHNICAL CONTENT

Primary Standard - "the standard for standards"

- o nine factors common to nonsupervisory jobs in GS-1/15
 - 1 - knowledge required by the position
 - 2 - supervisory controls
 - 3 - guidelines
 - 4 - complexity
 - 5 - scope and effect
 - 6 - personal contacts
 - 7 - purpose of contacts
 - 8 - physical demands
 - 9 - work environment
- o degree level definitions given for each factor
- o points assigned to degree levels
- o conversion chart changes total points to GS grades

Factor Level Descriptions - FES standard for an occupational series

- o redefines Primary Standard in terms specific to the covered occupation
- o includes introductory and background materials about the occupation
- o illustrated by Benchmark Job Descriptions

Benchmarks - representative work situations in an occupation

- consist of statement of duties and description of the nine factors
- point-rated position descriptions

IMPACT OF FES

- o Will replicate grades of correctly classified positions
- o Ease of understanding - e.g. standards and descriptions in same format, degrees and points shown -- will promote support
- o Narrative and Factor systems will co-exist for several years
- o FES is modern, cost-effective and meets future needs

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GUIDE FOR WRITING POSITION DESCRIPTIONS

UNDER THE FACTOR EVALUATION SYSTEM

This guide is designed to assist you in writing a description of your position duties and responsibilities in the format required by the Factor Evaluation System (FES). Under the Factor Evaluation System each of ten position factors is evaluated individually and point values are assigned on the basis of a comparison with an evaluation standard for the occupational series of the position. Failure to cover each factor properly could result in an incorrect evaluation. Therefore, in preparing your position description, you should address each factor even though this may involve providing some of the same information more than once.

Your position description should be a concise and accurate statement of duties and responsibilities of your position and related requirements and conditions that are considered in the evaluation of the position. The position description will be used primarily for evaluating your position grade and for determining your status (exempt or nonexempt) in terms of the overtime provisions of the Fair Labor Standards Act.

A. POSITION IDENTITY

Briefly identify your position as to title, organizational location and position number.

B. MAJOR DUTIES

Describe concisely each major duty you are required to perform. Tell what you do, how you do it and why. You may organize your duty statements either in order of importance or sequence of performance.

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Be specific in the use of words. Avoid ambiguous words such as assists, coordinates, handles or prepares, unless further qualified. Use action verbs such as compiles, types, searches, establishes, evaluates or analyzes. Also indicate the average percentage of time you devote to each duty.

C. EVALUATION FACTORS

1. Knowledge Required by the Position:

Specify the nature and extent of information or facts you must understand to perform acceptable work (e.g., knowledge of steps, procedures, practices, rules, regulations, policies, theories, concepts, and technical or scientific disciplines). Also indicate any academic degrees which are mandatory and any required specialized skills and abilities such as typing, taking dictation, or foreign languages.

2. Supervisory Controls:

Specify the nature and extent of control exercised by your supervisor over the work you perform. This should include such items as instructions given when work is assigned; priorities and deadlines set for completion of work; your authority to modify or recommend changes in instructions; the extent of assistance provided during accomplishment of work; and the extent of review of completed work (e.g., close or detailed review of each phase of work, spot-check of end product for accuracy, or review for adherence to policy only).

3. Guidelines:

Specify the nature of guidelines and regulatory material you use in the performance of your work (e.g., manuals, reference material, text books, policy directives, etc.) and the extent of judgment you are required to exercise in applying and interpreting the guidelines.

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4. Complexity:

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Indicate the nature and variety of the work you perform; the degree to which you must vary work processes and discern inter-relationships and deviations; and your responsibility for the development of new techniques or approaches in resolving problems where established policy or procedure does not exist.

5. Scope and Effect:

Indicate the purpose of the work performed and the effect of work produced both within and outside your immediate organization. Also indicate how errors in work or poor judgment would affect Agency operations or activities.

6. Personal Contacts:

Identify by title and organization those persons with whom you have contact in performing your duties and the frequency of such contacts. In addition to your contacts within the Agency, external contacts within other Agency, Departments, private industry, etc. should also be included.

7. Purpose of Contacts:

Specify the purpose of your contacts (e.g., to exchange information, to discuss technical problems and/or to negotiate agreements) and the authority you may have to commit your component or the Agency to a specific course of action. Also indicate the extent to which you are responsible for establishing contacts.

8. Physical Demands:

Describe any physical requirements and demands, such as agility, dexterity and physical exertion required in the performance of your duties. Also indicate the frequency and intensity of such demands. If no requirement exists, so indicate.

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9. Work Environment:

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Describe such conditions as improper lighting, heating, and ventilation; exposure to dust, grease, contagious diseases or irritant chemicals; working at great heights or in extreme cold or heat; or exposure to physical attacks, mob conditions, or military action. Also describe any unusual cover or security considerations. If there are no unusual conditions, so indicate.

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10. Supervision Exercised:

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This factor is to be completed only in those cases where the incumbent has supervisory or management responsibility. Each item should be covered completely and accurately. Indicate in Elements 1, 2 and 3 the percentage of time spent on the activities covered during the work period.

ELEMENT I: Work Planning and Organization

Describe your responsibility for planning and scheduling work; determining and providing staff resources and equipment for accomplishment of work; establishing and adjusting work schedules, priorities and deadlines; developing, reviewing, approving, modifying or rejecting changes in functions, organizational structure, position design and staffing levels; and preparing, reviewing and analyzing production records and schedules.

Example: Plans work schedules and projects production one year in advance. Reviews schedules quarterly and makes adjustments as necessary to accommodate the accomplishment of new work and to eliminate backlogs. Determines staffing levels and supplies and equipment needed to accomplish mission. Determines the organizational structure of the Branch and functions to be assigned to individual positions. Reviews weekly activity reports to keep informed of status of such activities as backlogs and individual workloads.

ELEMENT II: Work Assignment and Review

Describe your responsibility for the assignment and review of work of subordinates, including how you assign work (individual jobs or

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initial assignments with continuing responsibility on the part of the incumbent to perform the work without further instructions). Also indicate the nature and extent of instructions provided at the time of assignment, assistance provided during accomplishment of work, and review made of completed work.

Example: Determines and assigns areas of responsibility to Section Chiefs of the Branch.. Provides specific instructions regarding work methods and procedures to be followed and deadlines to be met. Consults and advises with Section Chiefs on problems encountered and proposes solutions or methods of elimination. Reviews work during accomplishment and upon completion for conformance with initial instructions and overall policy objectives.

ELEMENT III: Personnel Management Functions

Describe your responsibility for each of the following personnel management functions: (a) determining types and selecting personnel; (b) assigning personnel; (c) recommending and/or approving promotions; (d) training personnel; (e) resolving personnel complaints and problems; (f) evaluating and counseling employees on performance; and (g) initiating disciplinary action.

Example: Determines the types and numbers of personnel to be assigned to each section of the Branch and, in collaboration with Section Chiefs, selects individuals to be assigned. Monitors the training and career development of all Branch personnel including recommending formal and on-the-job training courses, programs and rotational assignments. Evaluates individual performance and recommends actions such as promotions and reassignments.

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counsels individuals on performance, career development, personal problems and related matters that may affect performance or development.

ELEMENT IV: Scope and Variety of Activities

Indicate under this element the numbers, grades, and titles of personnel supervised, the various activities and functions for which you are responsible, and the organizational structure and echelons of your organization.

Example: Responsible for the technical and administrative activities of 27 employees. Eighteen of these employees are professional Intelligence Officers ranging in grade from GS-09 through GS-13. There are also three Section Chiefs at grade GS-14 and six secretaries, Intelligence Assistants and Clerk Typists ranging in grade from GS-04 through GS-07. The Branch is charged with the production of finished intelligence on political, military, economic and industrial activities in countries X, Y, and Z. These reports are used as a prime source of information for development of U.S. policy pertaining to countries X, Y, and Z. The Branch consists of three operating sections with a staff of eight per section.

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3. ACTION		POSITION TITLE	1. SERVICE DESIGNATION	2. POSITION NUMBER		
A. PMCD	Secretary-Steno		GS	0318.01	GRADE	INITIALS
B. INITIATING OFFICE						DATE
4. ORGANIZATIONAL TITLE OF POSITION (If any)			6. CERTIFICATION			
5. ORGANIZATIONAL LOCATION			A. EMPLOYEE		C. OFFICE REPRESENTATIVE	
			B. SUPERVISOR		D. PMCD	

7. DESCRIPTION OF POSITION

A. Position Identity:

Under the general supervision of the Chief, XYZ Staff serves as secretary responsible for providing general secretarial and stenographic support, and manages the XYZ Staff office. Also provides secretarial support for the Executive Assistant to the Office Director.

B. Major Duties:

Establishes office procedures, correspondence controls, files, and project records. 5%

Receives visitors and telephone calls to the office, both from within and outside the Agency. 10%

Maintains office calendar, makes appointments, and schedules conferences with authority to commit supervisor's time. 10%

Prepares agenda, compiles background data, and assembles any special material needed by superior in attending or conducting conferences, briefings, etc. 5%

Attends office meetings and/or staff conferences taking notes of proceedings and prepares resumes of pertinent subject matter.

Receives, logs, and reviews correspondence, cables, dispatches, etc., and calls pertinent items to the attention of her superior. Maintains record of follow-up actions required and priority deadlines. 15%

Composes routine correspondence and/or drafts from notes provided by superior requiring a good knowledge of the organization, procedures, and projects of the office. 10%

Reviews outgoing correspondence for subject matter consistency, format, grammar, adherence to office practices, proper coordination, etc. 10%

Maintains a wide variety of records, files, and reference material. 10%

Performs a variety of stenographic and typing services for XYZ Staff office. 20%

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Assists with research associated with study efforts. Locates documents, articles and other information as required. Performs related duties as required.

10%

C. Evaluation:

1. Knowledge Required by the Position:

Good knowledge of the office internal structure and a working knowledge of the Agency organization.

Good knowledge of office procedures, routines, and coordination requirements.

A knowledge of administrative, operational and technical terminology.

A good knowledge of grammar, spelling, and punctuation.

Ability to manage a file system.

Ability to locate and correlate a variety of data for superior.

Ability to oversee and carryout front office assignments for senior officers.

Skill in taking and transcribing dictation and in operating a manual, electric, or automatic typewriter.

2. Supervisory Controls:

Superior provides general office operating guidelines and objectives. He also outlines the general procedures and work priorities. The incumbent exercises independent judgement in planning and organizing work and accomplishes most tasks with no direct supervision.

3. Guidelines:

Agency manuals, reference material, and office guides are available, but the incumbent must properly interpret and apply these guides.

4. Complexity:

The work varies from clerical support in XYZ Staff to serving as a substitute secretary in the Office of the Director. Work processes are not always structured or constant and the incumbent must be adaptive to changing requirements. The product produced by the incumbent often is delivered directly to the Office Director without intermediary review or corrections. The incumbent will be responsible for establishing new correspondence formats and handling procedures as planning projects originate.

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5. Scope and Effect:

Errors in work assignments could reflect directly upon the supervisor and upon the office. Failure to perform effectively as a point of contact for the Staff could result in the loss of valuable contacts and working relationships.

6. Personal Contacts:

The incumbent must maintain good relations with personnel within the Office and the Agency. Incumbent has telephone and personal contacts with Branch, Division, Office level officials throughout the office and the Agency as well as similar levels in other USG agencies.

7. Purpose of Contacts:

The maintenance of rapport with Agency contemporaries facilitates the arrangement of meetings, exchange of information, collection of data, and ensures that the product of the Staff is presented in the correct format, coordinated with the appropriate people, and well received.

8. Physical Demands:

There are no unusual physical demands.

9. Work Environment:

There are no unusual work conditions.

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POSITION DESCRIPTION

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POSITION # CHEMIST, GS _____

This position is a sub-journeyman project engineer.

DUTIES:

1. Under the general supervision of incumbent is responsible for: (a) determining comparative feasibility of using internal or external (contractor) capabilities to satisfy the requirement; (b) identifying which, if any, external contractors could or should be used based on capabilities and/or security requirements; (c) establishing realistic timetables for completion of projects; (d) monitoring progress of the project; and, (e) ensuring that the end product satisfies the requirement. 60%

2. Assists requesting components in defining requirements in technical terms and ensures that all components involved in the requirement are clearly communicating with each other in order to preclude wasted effort through duplication or mis-information. 30%

3. Ensuring that he keeps abreast of the latest technology in the appropriate disciplines in order to bring to bear the best that these fields have to offer in answer to Agency operational requirements. 10%

FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION:

The position requires an advanced degree in Chemistry or Physical Sciences or the equivalent in experience. A working knowledge of Agency procurement and contracting policies and procedures is essential. The incumbent is required to have an ability to assume responsibility for monitoring contracts involving sums up to \$50,000, ensuring that project is continually reviewed for cost effectiveness, and that delays and overruns are kept to an absolute minimum.

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FACTOR 2, SUPERVISORY CONTROLS:

Assignments are made by the supervisor with objectives and resource constraints. In consultation with his supervisor, project deadlines and priorities are set. The incumbent plans and carries out the work independently, resolving most problems as they arise. He will occasionally seek guidance or direction on difficult technical problems or on unusual circumstances which affect large sums of money or security considerations. Performance is evaluated by end results and directly related to customer response, with little or no review of work in progress.

FACTOR 3, GUIDELINES:

The incumbent is given a wide latitude in terms of judgement during the progress of a given project. Policy and procedural guidance is available in the Project Engineer's Manual and the Project Officer's Manual.

FACTOR 4, COMPLEXITY:

This factor is represented by the typical Project Engineer's workload, which generally consists of four to six projects being monitored simultaneously, with each project involving from one to two contractors or Agency components. Each of these projects, contractors and/or components must be carefully monitored to ensure that their efforts are coordinated and meet established schedules as well as cost limits. The primary controlling factor, which is the customer's requirement, is continually examined by the incumbent and his supervisor to determine which trade-offs, in terms of requirements and available resources, are acceptable. In order to make these types of decisions during the course of a project, the PE must also consider long-range precedent, foreseeable advances in technology, programmed obsolescence and other factors as they apply to a given project or series of projects.

FACTOR 5, SCOPE AND EFFECT:

The incumbent's performance and expertise have a direct impact on the Agency's ability to furnish the policy making bodies of the U.S. Government with timely and accurate intelligence. Technical support of Agency operations must be of a quality higher than that which is encountered in opposition intelligence and countermeasure operations in order to be effective. The consequence of error or incompetence could possibly go undetected long after an operation is over, causing erroneous or insufficient intelligence to be reported through Agency channels. Technical malfunction of a given operational item could result in loss of an agent's life as well as incalculable damage to international relations.

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FACTOR 6, PERSONAL CONTACTS:

Personal contacts include representatives, at the working and senior levels, from various and sundry Agency components within and outside the other USG agencies, contractors from the private sector and industrial laboratories.

FACTOR 7, PURPOSE OF CONTACTS:

Contacts are made, on the incumbent's initiative, to provide and seek consultative type discussions with known authorities and companies involved in several fields of science and engineering solicit bids and determine capabilities, monitor progress, and participate in active negotiations regarding development or engineering projects.

FACTOR 8, PHYSICAL DEMANDS:

There are no unusual physical demands placed on the incumbent.

FACTOR 9, WORK ENVIRONMENT:

Duties are performed in an office setting, with occasional travel requirements.

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GUIDE FOR WRITING SUPERGRADE POSITION DESCRIPTIONS
UNDER THE FACTOR EVALUATION SYSTEM

A. POSITION IDENTITY

Briefly identify your position as to title, organizational location and position number. Identify the title and organizational level of your immediate superior. Indicate the size, occupational make-up, and level of your immediate staff.

B. MAJOR DUTIES

Describe concisely each major duty you are required to perform. Tell what you do, how you do it and why. You may organize your duty statements either in order of importance or sequence of performance.

Be specific in the use of words. Avoid ambiguous words such as assists, coordinates, handles or prepares, unless further qualified. Use action verbs such as compiles, searches, establishes, evaluates or analyzes. Also indicate the average percentage of time you devote to each duty.

C. EVALUATION FACTORS

Factor I -- Knowledges, Skills and Abilities:

This factor measures the extent and degree of knowledge and skills required to perform the activities of the position.

Knowledge is viewed as the range of information or understanding of a subject or variety of subjects necessary to the function. Consideration is given to the amount of knowledge; in addition, consideration is also given to the breadth of knowledge (various types required) and the depth of knowledge (extent of both comprehensive and detailed understanding of a specific subject). The actual knowledge requirements are of singular importance..

Knowledge is viewed as the combined result of a formal education, experience

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and training; how the knowledge is acquired is significant only if it serves to clarify the range or depth of the knowledge requirements.

Skills to be considered are those needed to apply acquired knowledge, or natural or developed abilities, to the activities and functions of the position. Examples of the kinds of skills to be measured are:

- Analytical skills, or the ability to define problems precisely and to identify and combine relevant facts objectively and in perspective
- Creativity, or the ability to develop or produce new concepts, techniques, or programs through imaginative or innovative skills.
- Initiative, or the ability to take action with a minimum of prompting
- Judgment, or the ability to reach rapid and sound decisions.
- Leadership, or the ability to plan and coordinate the activities of subordinates.
- Planning skill, or the ability to identify the steps necessary to reach objectives and to define practical courses of action.

Factor II -- Difficulty of Work:

This factor measures the complexity and difficulty of the assigned activities. In measuring the above element, consideration is given to:

- The scope and variety of activities measured in terms of the breadth of responsibilities and the number of different types of programs.
- The types and frequency of the problems encountered and of the decisions necessary to resolve them.
- The intensity of the demands on the position.
- The extent to which the position is responsible for planning and policy formulation.

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- The magnitude of the assigned activities measured in terms of financial and manpower responsibilities.

Factor III -- Responsibility:

This factor measures the impact of the results of decisions and actions and the extent to which the position can influence or affect results. In evaluating impact, consideration should be given to:

- The significance of results on the public, the economy, and the management of the Government.
- The magnitude of the position's impact or influence on results.
- The type of impact--whether direct or indirect.
- The extent of the position's decision-making latitude or authority to act independently, and the ability to commit resources.

Factor IV -- Personal Relationships:

This factor measures the need for the ability to meet and deal effectively with people. In analyzing positions on this factor, elements to be considered include the purpose and frequency of the relationships and with whom the relationships must be maintained.

In measuring the relationship requirements of a position, prime consideration is given to:

- The scope of the relationship in terms of whether they are confined to the immediate organization, the particular agency, or outside organizations representing Government or private business industry.
- The level of contacts, the extent of controversy involved, and the importance to the organization of having the required relationships established and maintained smoothly and effectively.

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- The nature of the relationships in terms of their effect on the success or failure of the organization's programs.
- The relative frequency of relationships requiring interpretive skills
- The degree to which you are required to present, justify, defend, negotiate or settle controversial matters.

Factor V -- Supervision and Guidance Received

This factor covers the nature and extent of instructions and guidance received, the extent to which the incumbent can independently plan the accomplishment of assignments and the degree of review made of completed work. In evaluating this factor consideration is given to:

- Type of instructions given, written or verbal, specific or general, etc.
- Authority to plan and schedule the accomplishment of work, establish deadlines and priorities, resolve problems encountered during accomplishment of work, etc.
- Type of review made - close review, general review to ensure objectives are met, overall evaluation of achievement in terms of meeting objectives, etc.

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SAMPLE POSITION DESCRIPTIONA. Position Identity

Chief, Advanced Systems Development Engineering Division, Position #XYZ
Immediate Supervisor - Director, Office of Applied Research and Development Engineering. The supervisor manages one of six Offices located in the Directorate of Scientific Research and Technological Development responsible for a major segment of the Directorate's research and development mission. The Advanced Systems Development Engineering Division has a total multi-disciplinary workforce of 63 employees comprised of physical scientists, engineers, physicists, mathematicians, operations research analysts, and clericals. The Division consists of three branches in Headquarters and two field offices in proximity to contractor plants. It is structured along functional and project management lines commensurate with the major segments of its mission, namely, the design, development, fabrication, testing and delivery of ground technical intelligence collection systems.

B. Major Duties

1. Plans, directs and coordinates a development engineering program which culminates in the certification and delivery of advanced systems for the ground collection of technical intelligence. In this connection, evaluates, presents and defends proposals to senior and top management for development of new advanced systems with consideration given to cost and time constraints, user requirements, contractor capabilities, technological challenges, etc.

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Upon receiving project approval, allocates and manages the resources including funding, facilities and the mix of in-house and contractor personnel necessary to achieve project objectives.

2. Reviews Requests for Proposals (RFPs) received from contractors and recommends source selection based on contractors' technical capabilities, previous performance, financial stability and reasonableness of cost estimates.

3. Provides guidance and technical assistance to subordinate program managers and project engineers in such areas as formulating technical approaches, participating in contract negotiations, and monitoring contractor performance in terms of meeting critical milestones within programmed funding levels and time periods.

4. Approves amendments to contracts where proposed changes in engineering design or in materials are within the original scope of work and funding authorizations. Recommends approval or rejection of proposed out-of-scope contract amendments resulting from overruns or unforeseen changes in user requirements that impact on the capabilities and operational utility of the systems under development.

5. Serves as member of the Office-level Project Review Board, and in this capacity, participates in the review and assessment of current and proposed advanced developmental projects.

6. As a recognized authority in ground technical intelligence collection systems, serves as Agency representative on interdepartmental and PFIB committees engaged in planning, programming and

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coordinating R&D programs for such systems, and in assessing technological gaps between user requirements and current technical collection capabilities.

C. Evaluation Factors

I. Knowledges, Skills and Abilities

A thorough knowledge of theories, concepts, principles and practices of more than two disciplines in the physical and engineering sciences. Knowledge of the potential uses, capabilities and limitations of ground technical intelligence collection systems.

A very good knowledge of project management principles and practices, and demonstrated ability to apply such knowledge in planning, directing and coordinating the activities of subordinates and contractors, and in developing and achieving program goals.

Ability to visualize future technical intelligence collection needs of the Agency, and to conceive innovative developmental projects that will serve to meet such needs.

A very good knowledge of research methods and techniques as they relate to the planning, direction and administration of advanced developmental projects.

II. Difficulty of Work

The projects managed by the incumbent are multi-disciplinary and involve the development and application of new concepts and technologies that advance the state-of-the-art. The number of on-going projects during a fiscal year average seven, and are characterized by requiring, in the aggregate, the expenditure of funds ranging from \$3,000,000 to \$5,000,000. The average duration of such pro-

jects is one to three years from initial design to hardware delivery for operational use. The projects are of such scope as to require a systems approach, rather than the sequential independent development of specific components. Thus, the incumbent of this position is frequently required to monitor the efforts of integrating contractors. Technical problems occur frequently and are usually without precedent. Therefore new approaches to problem solution are frequently conceived and tried. Such problems are not readily foreseen, thus their effect on the technical and financial aspects of the projects cannot be predetermined. Project management requires that a mix of related factors including contractor performance, time and budgeting constraints, cost-sensitive technical decisions and changing goals be maintained in proper balance and perspective.

III. Responsibility

Incumbent's responsibility for determining internal staffing, budgetary and material requirements are subject to review and approval at Office, Directorate and Agency levels. Similarly, responsibility for determining program goals and objectives, selection and prioritizing of projects, and major redirection of on-going projects often with funding and technological implications, is also subject to higher reviews and approvals. Incumbent is authorized to make and implement decisions on day-to-day technical and project management matters that are within the scope of the basic contract. Incumbent is responsible for tracking and assessing contractors' performance, and for alerting senior and top management officials early to potential

problem areas such as overruns and dim prospects of meeting critical milestones. As a member of the Office-wide Project Review Board, incumbent exercises considerable influence on final decisions relative to the undertaking, expansion and termination of advanced developmental projects that involve the expenditure of large amounts of funds. Incumbent is authorized to commit and allocate personnel and funds to approved developmental projects. Although some latitude exists for experimental errors arising from technically high-risk projects, failure to make sound technical and managerial decisions and recommendations could result in the excessive waste of Government funds and man-hours, and the loss of valuable intelligence because of malfunctioning technical collection systems or the non-availability of such systems to meet current and future requirements.

IV. Personal Relationships

Position involves personal contacts with Agency officials at Office and Directorate levels, Office of the Comptroller, other Federal agencies, and the industrial and scientific communities for such purposes as presenting and defending project proposals, exchanging information on projects of mutual interest, remaining ^{appraised} apprised of the state of the art, providing guidance to contractors in the resolution of technical problems, coordinating interlocking developmental projects, and assessing technological gaps between user requirements and current technical collection activities. Contacts in industry range from the nonsupervisory scientist and engineer levels through the project manager and corporate levels of management. Personal contacts are also with the Agency contracting

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officers to provide counsel on the technical aspects of contract negotiation and administration. Matters being discussed occasionally are controversial, such as suspected duplication of effort on developmental engineering projects in cognizant areas both within the Agency and the Intelligence Community. Matters of this kind necessarily require the exercise of tact and persuasiveness.

V. Supervision and Guidance Received

Receives broad direction and policy guidance from Director, Office of Applied Research and Development Engineering. Assignments are general in nature and consist of program goals and priorities, scope of projects, suggested developmental approaches, funding constraints, and interpretations of new or revised policies to be followed.

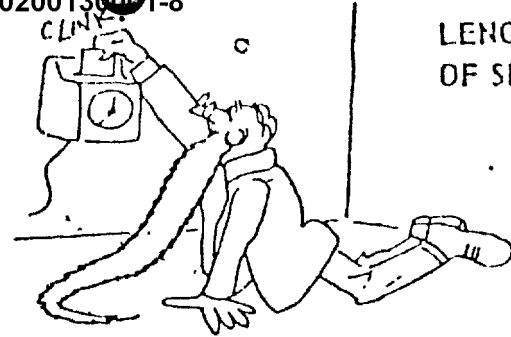
Receives minimal guidance in planning, organizing and directing work to be accomplished both by subordinate professional staff and contractor workforce. Performance is evaluated for technical cost-effectiveness, conformance with instructions and governing policies, and quality and timeliness of end product. Superior has general oversight responsibility over incumbent's participation on inter-departmental and PFIB committees to insure that the Agency's position on R&D programs of community-wide scope or interest is properly reflected, and that incumbent's recommendations and opinions expressed in such meetings are consistent with Agency policy.

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THESE THINGS DON'T COUNT IN CLASSIFYING YOUR POSITION

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UNUSUAL DILIGENCE
OR OVERTIME

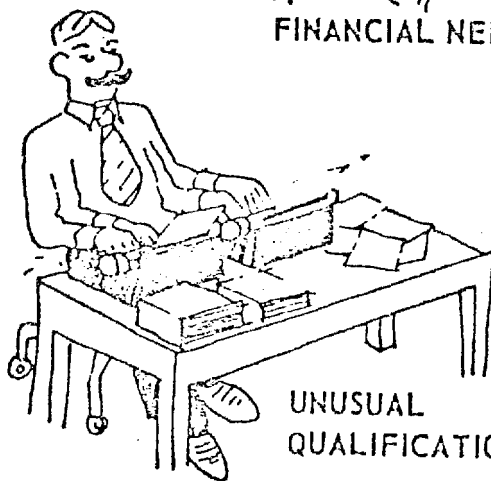
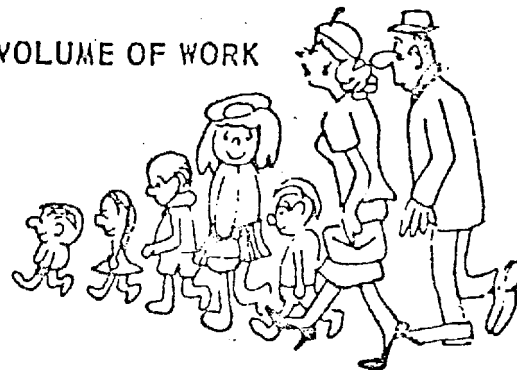


LENGTH
OF SERVICE



FINANCIAL NEED

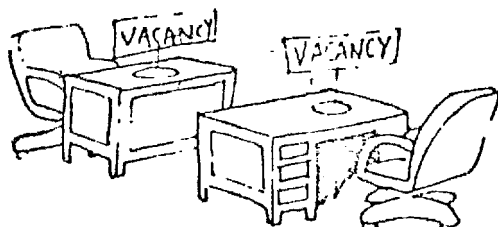
VOLUME OF WORK



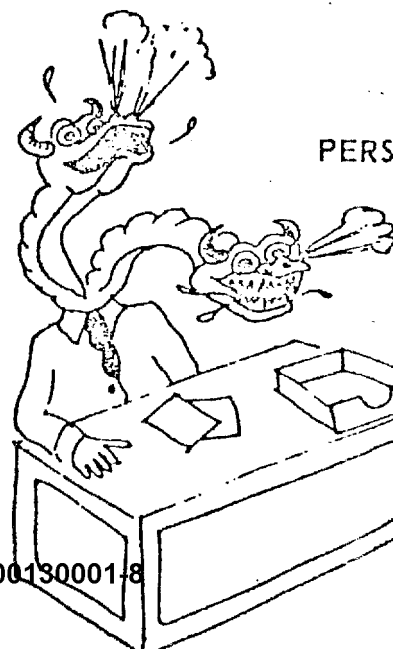
UNUSUAL
QUALIFICATIONS



RELATIVE
EFFICIENCY



SCARCITY OF NEW EMPLOYEES



PERSONALITY

These do:

1. Nature and variety of work.
2. Difficulty of the work.
3. Authority and responsibility exercised.
4. Extent of supervisory controls over the work.

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